**Investment and Portfolio Management**

**Fourth Stage – First Semester**

**Asst. Prof. Prabhu Mannadhan**

**Academic Year: 2022-2023**

**Course Book**

|  |  |  |
| --- | --- | --- |
| **S. No.** | **Information** | **Details** |
|  | **Course Name** | Investment and Portfolio Management |
|  | **Course Code** | BA401IPM |
|  | **Lecturer In-charge** | Dr. Prabhu Mannadhan |
|  | **College/Department** | Administration and Economics/Business Administration |
|  | **Contact Information** | bordauprabhu@lfu.edu.krd |
|  | **Time (in hours) per Week** | 3 Hours |
|  | **Office Hours** | Monday 9:00-01:00 |
|  | **Teacher’s Academic Profile** | https://staff.lfu.edu.krd/faculty/bordauprabhu |
|  | **Academic Title** | Assistant Professor |
|  | **Keywords** | Investment, Portfolio, Management, Common stock, Indirect investment |
|  | **Course Overview:** The course presented examines the theoretical basis and practical approach to managing investment portfolios of financial assets. The course objective is to acquaint students with the theoretical foundation of modern portfolio theory, the major groups of investors and their investment objectives and constraints, and to learn how to employ practical skills in investment management, forming capital market expectations and forecasting markets activity to justify major investment portfolio management strategy for equity and fixed-income instruments. A distinctive feature of the course is to focus on practical issues of managing the investment portfolio, ground on the results of recent academic research in the field of portfolio management. As a result of the course, students will know the basic theoretical foundations of portfolio theory, understand the investment process scope and stages, be able to form market expectations and build strategic asset allocation, select the optimal investment strategy. | |

|  |  |
| --- | --- |
| **12.** | **Aims & Objective:**  1. To expose the students to various theories of investment,  2. To know different approaches of investments  3. To analyse individual securities and management of a portfolio in the  context |
| **13.** | **Course Requirement: Core Course**  Students are expected to come early to the class and bring their note books and other relevant material for learning. They are expected to adhere with the classroom etiquettes. |
| **14.** | **Teaching and Learning Method:** The module will be delivered to the students through the use modern technology, case study, reading material, flipped classroom, video and case analysis. The student-centered approach will be applied. The strategies to be implemented to target students learning outcome. |
| **15.** | **Assessment Scheme:**   * 25 % Mid-term Examination * 15 % Assignments and Quizzes * 60 % Final Examination |
| **16.** | **Students Learning Outcome:**  By the end of the course, students should be able to:   * Students gain the knowledge on stock market analysis with the help of Technical, Industry and common stock analysis. * Shall provide a thorough understanding on global investment policies and Portfolio Management Techniques. |
| **17.** | **Course Reading List and References**   * Investment Analysis and Portfolio Management, 8th edition, by Reilly and Brown, Southwestern, 2006. * Graham & Dodd, “Security Analysis and Portfolio Management”, McGraw Hill, Preeti Singh, “Investment Management”, Himalaya Publishing House, Bombay. * Bhalla, V.K., “Investment Management”, S. Chand & Co, New Delhi. * Dance, M.N., “How to Invest Wisely in Real Estates”, Sneh. * Fischer and Jordon, “Security analysis and Portfolio Management”, Prentice Hall. * Fuller and Ferrel, “Modern Investments and Security Analysis”, McGraw Hill. |
| **18.** | **Course Content** |

**Course Content**

|  |  |  |  |
| --- | --- | --- | --- |
| **S. No.** | **Lecture Week** | **No. of Hours** | **Topics** |
| 1. | Week 1 | 3 | MEANING OF INVESTMENT  CONCEPTS OF INVESTMENT  INVESTMENT OBJECTIVES |
| 2. | Week 2 | 3 | INVESTMENT AND SPECULATION  ELEMENTS OF INVESTMENTS  INVESTMENT ALTERNATIVES |
| 3. | Week 3 | 3 | SHARES, DEBENTURES AND BONDS  BANK DEPOSITS, POST OFFICE SAVINGS |
| 4. | Week 4 | 3 | PUBLIC PROVIDENT FUND (PPF), MUTUAL FUND SCHEMES, LIFE INSURANCE SCHEMES |

|  |  |  |  |
| --- | --- | --- | --- |
| 5. | Week 5 | 3 | GOLD-SILVER, DERIVATIVE INSTRUMENTS  COMMODITY MARKET (COMMODITIES), REAL ESTATES |
| 6. | Week 6 | 3 | FOREIGN INSTITUTIONAL INVESTORS (FII) |
| 7. | Week 7 | 3 | OBJECTIVES OF PORTFOLIO MANAGEMENT |
| 8. | Week 8 | 3 | **Mid Term Exam** |
| 9. | Week 9 | 3 | ROLE OF PORTFOLIO MANAGER |
| 10. | Week 10 | 3 | TYPES OF PORTFOLIOS |
| 11. | Week 11 | 3 | FINANCIAL PLANNING PROCESS  STOCK MARKET ANALYSIS  FUNDAMENTAL COMMON STOCK ANALYSIS |
| 12. | Week 12 | 3 | TECHNICAL ANALYSIS  INDUSTRY ANALYSIS |
| 13. | Week 13 | 3 | MODERN PORTFOLIO THEORY |
| 14. | Week 14 | 3 | Revision |
| 15. | Week 15 | Final Examination | |

|  |  |
| --- | --- |
| **19.** | **Examinations:**   * **Define the terms of Investment Management** * **List the methods of analyzing** * **Solve the problems in Investment and Portfolio Management** |
| **20.** | **Course Policy:**   * There will be many activities going on throughout the course period in order to ensure and guarantee the learning outcomes. Therefore, students are expected to pay full attention and participate in all classroom activities in order to maximize their learning and understanding. |
| **21.** | **Note:**   * Seek help from the lecturer or your classmates whenever you need to. * Time spent in learning is never wasted, however, make sure that you make it enjoyable. * Keep a personal notebook to write down your notes in the lectures. Don’t rely on your friend’s notes as each one of you is different and has different learning approaches. |